WMS Related Services Update

September 26, 2013

Midwest WMS Users Group Community Meeting

Jeff Hastings OCLC Library Services Consultant



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- WorldShare ILL
- License Manager/ERM
- Analytics
 - Collection Evaluation
 - Report Authoring
- CONTENTdm
- Discovery work going on

WorldShare ILL is available now, with



of the community already actively using it



✓ April 14, 2014 – end of new request creation in WorldCat Resource Sharing

✓ May 19, 2014 – End of access to WorldCat Resource Sharing

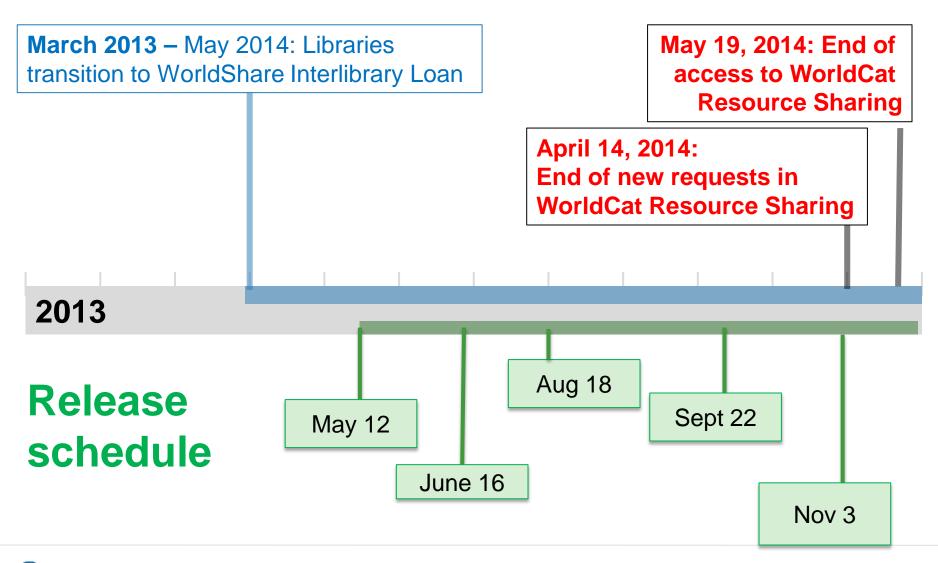


WorldShare ILL Roadmap? http://oc.lc/illfuture



Timeline





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Upcoming informational webinars

- <u>September 26</u>: WorldShare Interlibrary Loan: Update and Chat with the WorldShare ILL team
- October 9: ILLiad Best Practices: Variable lender aging
- October 10: WorldShare ILL Best Practices: Variable lender aging
- <u>November 14</u>: Completing your WorldShare ILL transition

View list of all upcoming events and register:

www.oclc.org/en-US/resource-sharing/events.html

Recent workflow enhancements

- Link to lender OPAC
- Transfer of bibliographic and holdings data into review requests
- Edit produced requests
- Record purchases within borrowing workflow
- Hot-linked request ID in confirmation notification

Recent enhancements

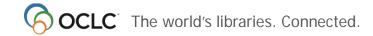
• Custom holdings:

In <u>OCLC Service Configuration</u>, custom holding groups searchable by an individual library symbol

• Constant data:

New rules determine when constant data is applied to records

• Support for Internet Explorer version 10



Recent printing enhancements

- Addition of pick-up location to borrower bookstraps
- Two-per-page request printing with additional data
- Bill-to address added to full request printing
- "Print now" from request screen
- Revised 1-per-page and 2-per-page request print layout

Details in August & September 2013 WorldShare ILL Release Notes

http://oc.lc/releasenotes

Planned printing enhancements

To be released through November

- Book stickers for lenders
- Customized bookstrap printing

ND CLIVE PL (9609) for use by Interlibrary Loan (NDCLV)
Read
Read
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Learn more: <u>http://oc.lc/illprint</u>

September enhancements

- Add and delete custom holding groups by symbol in OCLC Service Configuration
- Lenders can edit a produced request

Coming soon

• Links to freely available (open access) materials

- "Enter My Symbol Twice"
 - WorldShare ILL will look up the "days to respond" in Policies Directory
 - If 2 symbols in the same in a lender string, the system will NOT skip the 2nd symbol (will work as now)
 - ILLiad's EMST tables no longer used
 - Must be on version 8.4.1 or delete EMST libraries via Customization Manger
- Workflow enhancements for ILL referral centers
- ...and more...

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Policies Directory - Days to respond

OCLC, O test instituti		er Library Cente	er (OCL)							
Profile	Collections	Policies (22)	Schedule	Contacts						
							Last u	pdated Thursday, February 28	, 2013 3:20:36 I	PM ES
- Summary	/				_					
Name (Symbol):		OCLC, Online Computer Library Center (OCL)								
Also Called:		test institution								
Location:		Columbus, OH 43017	-3395 US							
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Fees:		Loans: 0.00 - 50.00) USD <u>More</u>) USD 750.00 TZS <u>More</u>	<u>2</u>						

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http://oc.lc/start

http://oc.lc/ill

http://oc.lc/releasenotes

http://oc.lc/known

http://oc.lc/instructor

http://oc.lc/easyschedule

http://oc.lc/illtraining

Subscribe to OCLC-SHARING-L listserv

License Manager

- The OCLC WorldShare[™] License Manager service consolidates link resolution, subscriptions, access, licenses, and vendor and rights management to enable Webscale management, discovery and delivery of licensed and electronic resources.
- Two Main Areas of Focus for FY14:
 - Standards-compliant import and export (ONIX-PL, ERMI)
 - Usage Statistics with Cost per Use

ERMI-Compliant Terms of Use

Documentation

- Citation Requirement
- Term Note
- Maintenance
 - Archival Copy Provided
 - License Delivery
 Instruction
 - Maintenance Window
 - Performance Warranty

Rights

- Applicable Copyright Law
- Clickwrap Override
- Database Protection Override Clause
- Fair Use Affirmed

Responsibilities

- Confidentiality of Agreement
- Cure Period for Breach
- Guaranteed Complete Electronic Content
- Guaranteed Content Quality and/or Quantity
- Guaranteed Electronic Currency
- Guaranteed Non-Infringing Content
- Licensee Indemnity
- Licensor Indemnity
 - Governing Jurisdiction
 - Licensee Termination Right
 - Licensor Reserves All Rights
 - Licensor Termination Right
 - Termination Right

User Access

- Accessibility / Disability Compliant Provider
- Authorized User
- Concurrent Users
- Copying and Sharing
- Course Materials
- Distance Education
- Electronic Linking
- Interlibrary Loan
- Post-Cancellation Access
- Remote Access
- Third-Party User Confidentiality Ensured



Harvesting Usage Statistics

Manage Rights	Па	Harvesting Usage Data -> Scheduled Harvests -> Harvest History for <vendor></vendor>						
Manage Templates	<u>< E</u>	< Back to Scheduled Harvests						
Manage Collections	На	rvest History for <vendor name=""></vendor>						
Manage Vendors	φ	Refresh Results 1-6 of 6		Actions				
Harvest Usage Data		Date and Time	Status	Results				
New Harvest		Fri 19 Oct 2012 02:15:50 PM PDT	In Progress					
Scheduled Harvests	0	Fri 19 Sept 2012 02:15:50 PM PDT	Failed	View Errors Restart				
		Fri 19 Aug 2012 02:15:50 PM PDT	Completed	View Report				
My Apps		Fri 19 Jul 2012 02:15:50 PM PDT	Completed	View Report				
, m) repo	12000							

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- Areas of Focus for FY14:
 - Data Warehouse of Statistics
 - Product Reports
 - Circ, Acquisitions, Metadata, License Manager, etc.
 - Data Dashboard
 - User Authored Reports using the Data Warehouse

Data Warehouse

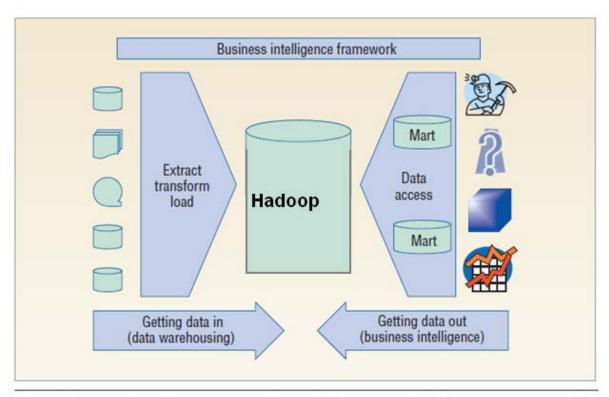


Figure 1. Business intelligence framework. The BI framework includes two primary activities, getting data in and getting data out.

Predefined Product Reports

[∞] WorldShare [™]		Metadata Acquisitions License
Collection Evaluation My Library	Transit Report	
Manage Comparisons Reports	Limit Dest. Location Limit Reason Limit Format Browser View PDF Export Excel Export	

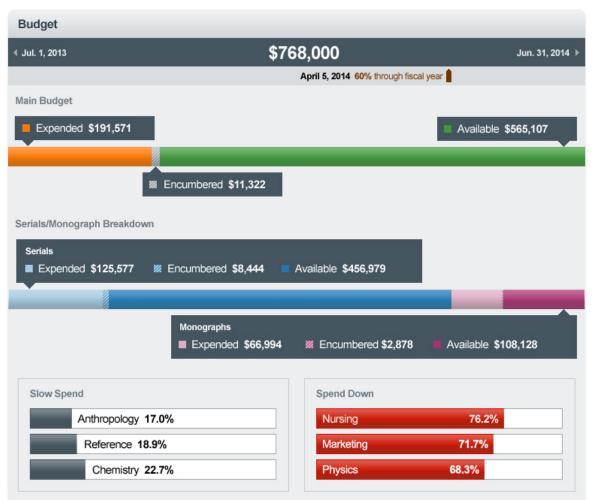
Transit Report

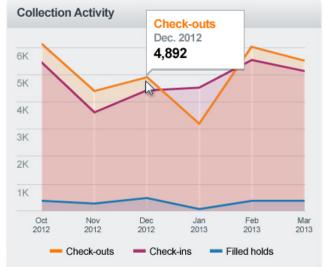
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012-03-28	12:28:20	RESHELVE		EAST	EAST-STACKS	60 minute guide to Java /	525.369	34079575	525369000
013-02-04	19:09:01	RESHELVE		MAIN	MAIN-STACKS	No easy way : the story of Ted Williams and the last .400 season /	796.357092 BOWEN	320621691	311869998975
013-02-04	19:09:15	RESHELVE		MAIN	MAIN-Periodicals	Nature.	Per Shelves	1586310	341245213432
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012-06-13	09:27:32	RESHELVE		SOUT	SOUT-STACKS	Let it snow : three holiday romances /	PZ3280 .G32 2008	216938851	86753092
012-02-03	06:57:58	RESHELVE		EAST	EAST-STACKS	Don Quixote /	PQ6329 .A2 2003b	51848364	98080
011-09-28	16:30:14	HOLD		NORT	SOUT-STACKS	Making the most of RFID in libraries /		137313679	73666
012-08-03	11:50:46	RESHELVE		MAIN	MAIN-STACKS	Amulet.	PN6728.S749 K53 2008	156817910	10191
011-05-31	16:08:45	HOLD		NORT	STACKS	A little Java, a few patterns /	697.9 S112	37615436	3111860015498
011-03-23	16:42:18	RESHELVE		NORT	STACKS	The elements of e-mail style : communicate effectively via electronic mail /	652.55 H269	29636045	311186000964
011-05-02	11:02:47	RESHELVE		MAIN	STACKS	Building Internet firewalls /	655.49 V563	33212964	311186002068
011-03-31	15:28:47	RESHELVE		EAST	EAST-STACKS	James Bond : the secret world of 007 /	823/.914	43736666	6546464

Data Dashboard

Welcome, Doris Lessing | <u>log out</u> WorldShare[™] Management Services Metadata Acquisitions Licenses Circulation Interlibrary Loan Admin Analytics Help

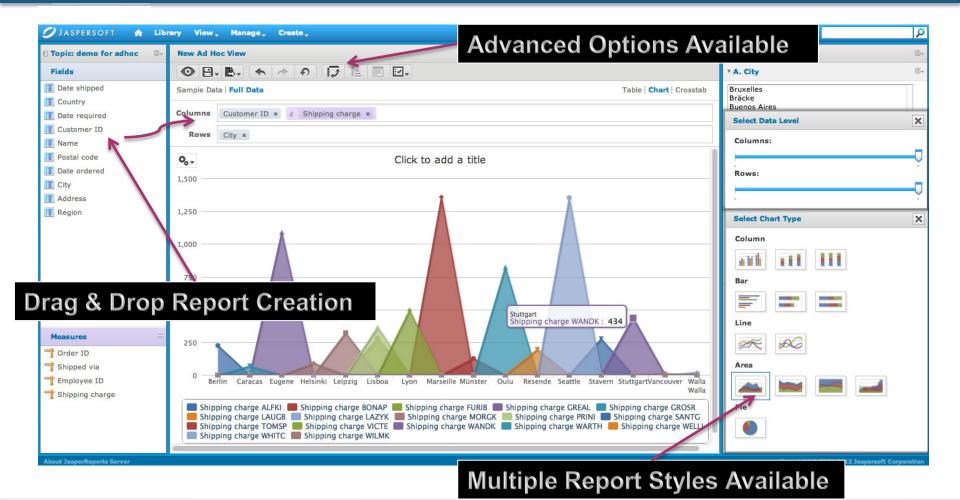
Northern Illinois University







Reporting Support: Authoring



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Connect more users to more content from your digital special collections via CONTENTdm



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CONTENTdm



A complete software solution



Stores, manages and provides access for all your digital collections

Your digital collections reside on a CONTENT M Server, either instal collections reside on a CONTENT M Server, either instal Collections reside on a CONTENT M Server, either instal collections reside on a CONTENT M Server, either instal coll



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Extracts from

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Some Rules how we shall d

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Offers open architecture; standards-based f

cost effectiveness

Dublin Core, JPEG2000, OAI Harvesting, PHP API and more draw of the Cantielies.

Contents.

CONTENTdm

Libraries' digitized assets.

End Users. Via CONTENTdm Web site.

- Search & Find & Use
- Comments, tags...
- (Can integrate with other html pages.)

Staff. Build / manage CONTENTdm \rightarrow cataloging, configuring.

- Catalog / metadata with digital items
- Database indexing
- Web pages configuration, customize if needed

Wider distribution / use.

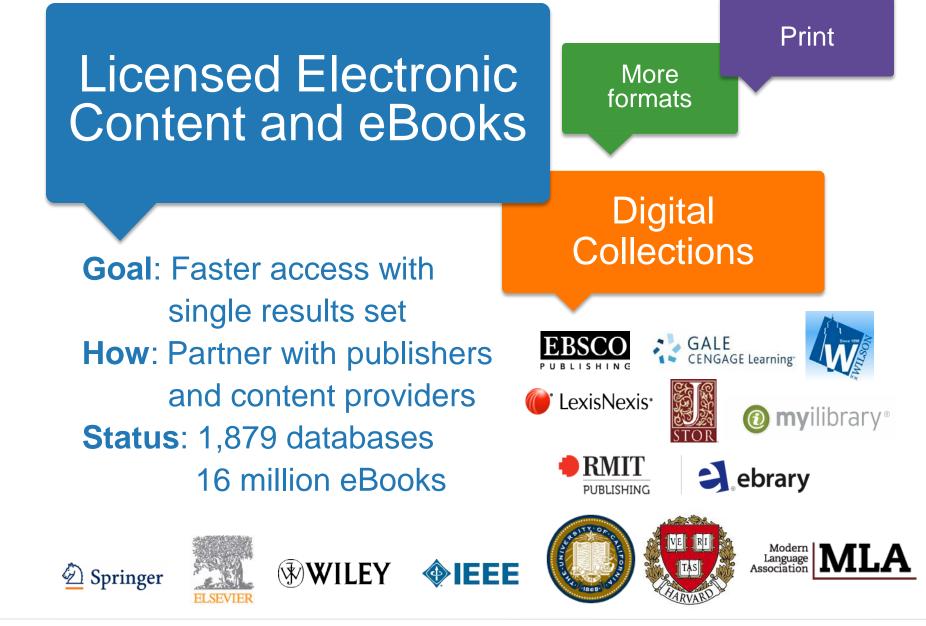
- OCLC WorldCat
- WorldShare Management Services
- WorldCat Local
- "Google search"

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Representing the collective collection

Bibliographic information in WorldCat	Licensed digital content/articles in library collections	Digitized local library content
304+ million bibliographic records 2.1+ billion holdings	994 million records 1,879 databases 91,495 journals	38 million items (Institutional repositories, Google, HathiTrust, OAIster)

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Gale and OCLC

- Gale Virtual Reference Library
- InContext





ProQuest and OCLC





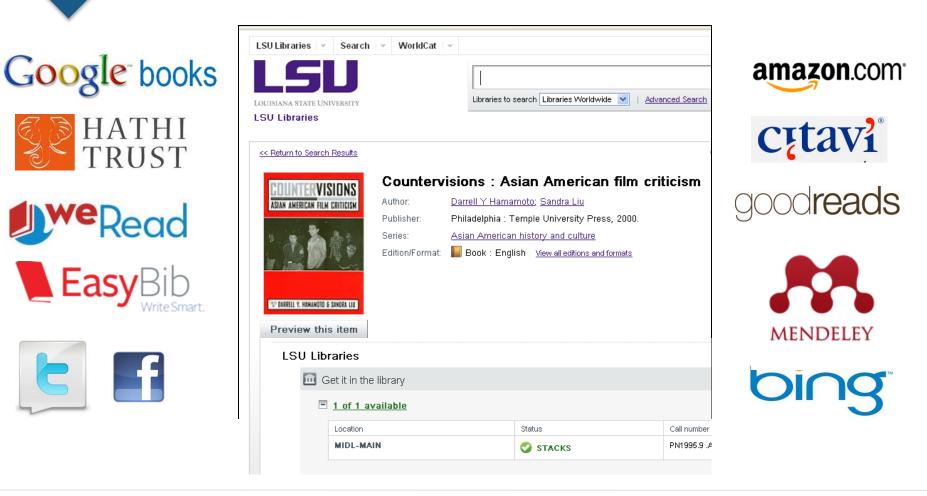


EBSCO, Gale & ProQuest

OCLC is the only organization that provides discovery for EBSCO, ProQuest and Gale databases/collections

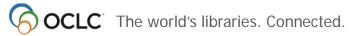
- EBSCO: 23 databases
- Gale: 22 databases in the Gale Scholarly Collections and up to 90 additional Gale collections
- ProQuest Central: 25 top-selling ProQuest full text databases and more than 90% of the content from an additional 40 more specialized ProQuest databases. Content is aggregated from more than 12,000 journals (9,000 in full text), more than 900 full-text newspapers, industry reports, company profiles and over 30,000 academic dissertations.
- New agreements with ProQuest & Gale will add >500 m items

Partnerships bring Web users to you

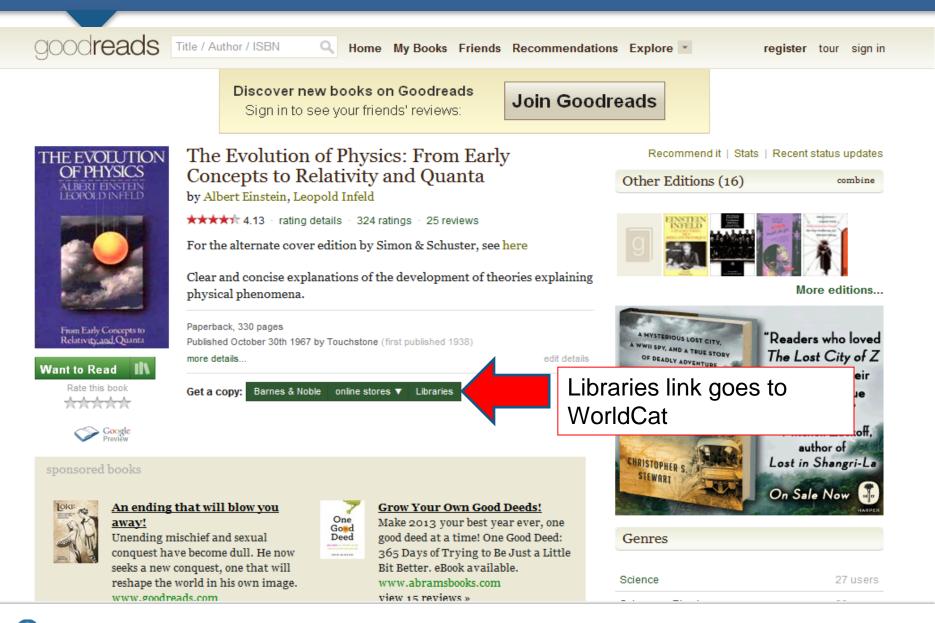


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- Bibliographical Information
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Libraries

Worldwide

- Find this book at your local library through WorldCat via
- Find this book at your local library through WorldCat via Yahoo!

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- . Find this book in the Canadian union catalogue via Library and Archives Canada
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- Find this book
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Africa

South Africa

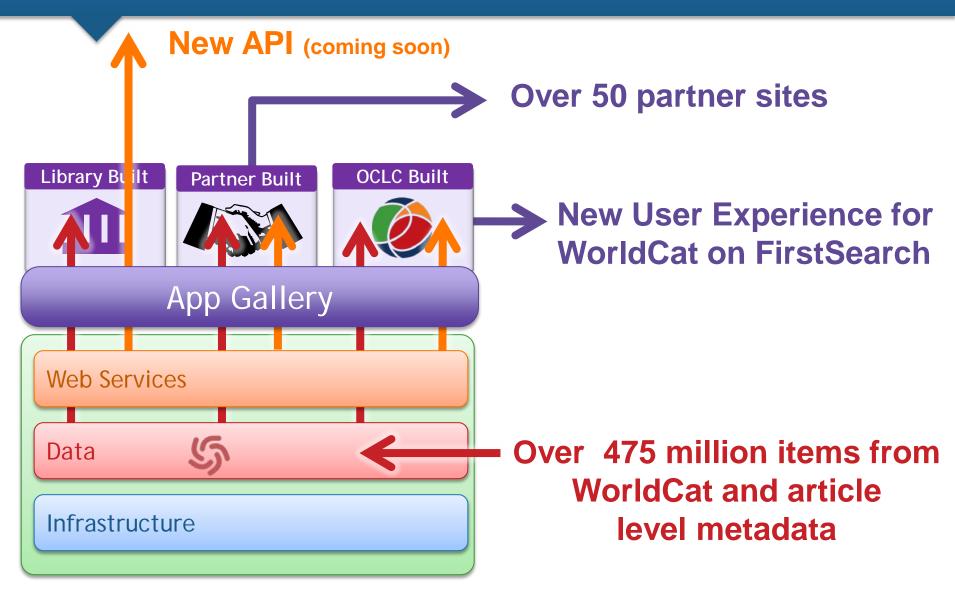
- . Find this book on the National Library of South Africa catalogue





WorldCat leads the list of Library Suppliers

WorldCat Discovery



Advisory Group

- Columbus Metropolitan Library
- Davidson College
- Johnson County Library System, Kansas
- Metropolitan Museum of Art
- University of Glasgow
- University of Maryland College Park
- University of Massachusetts Amherst
- University of North Carolina Wilmington
- University of Washington
- University of South Florida

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Susan Ariewa

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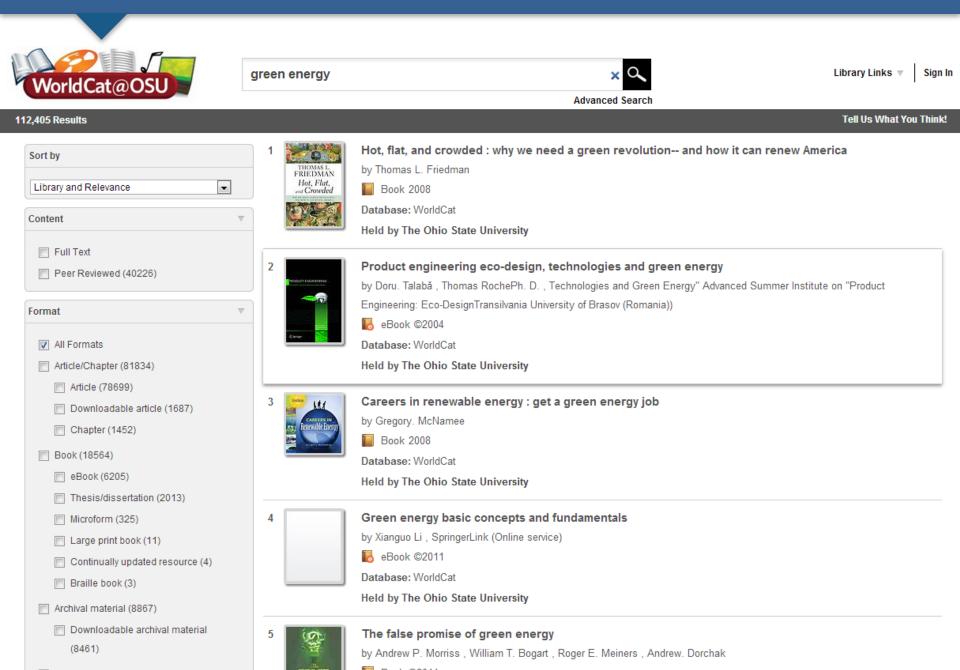
Consolidating interfaces

Single Discovery interface – bringing together the best of all OCLC interfaces FirstSearch WorldCat.org WorldCat Local

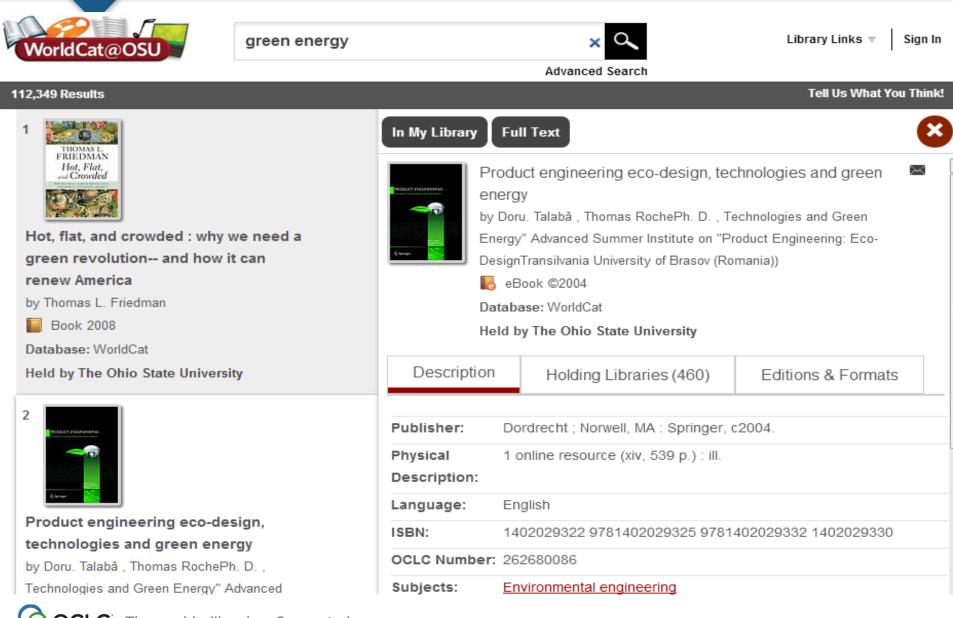
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A look at search results

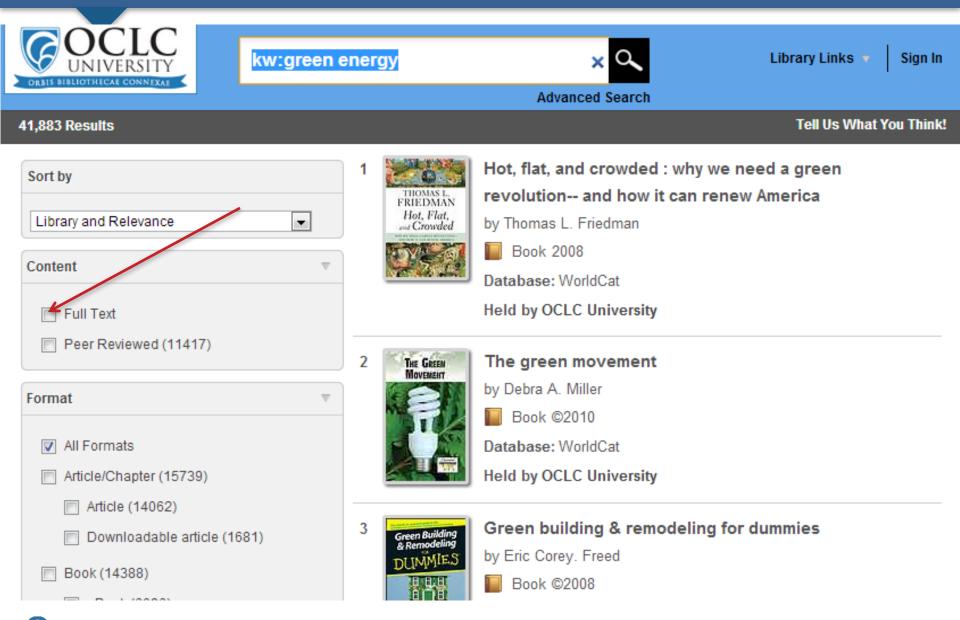


The detailed record with local library links



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User gets to full text

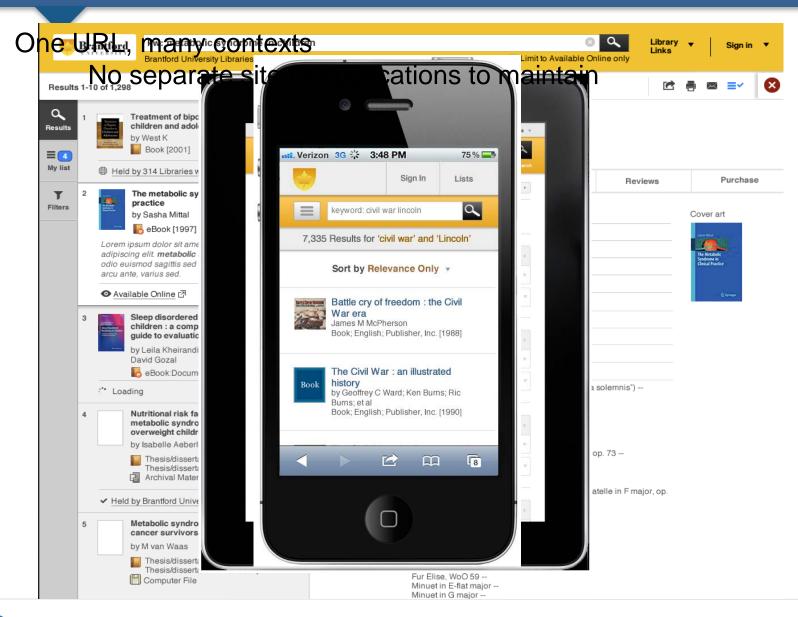


Resolver is built in

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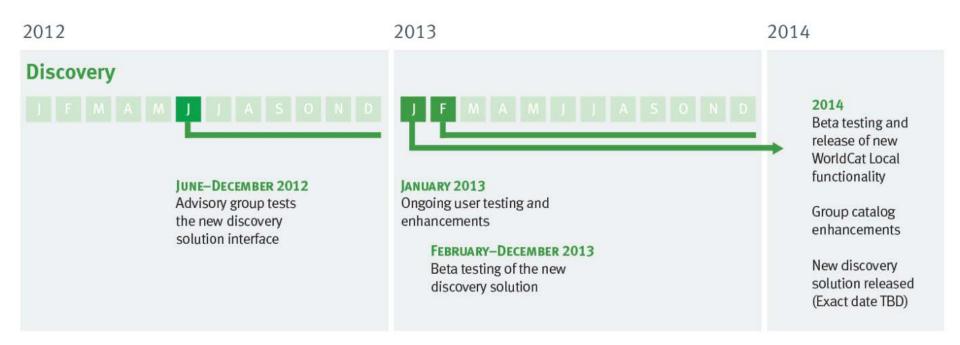
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Adaptability



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Metadata, Discovery and Delivery Timelines



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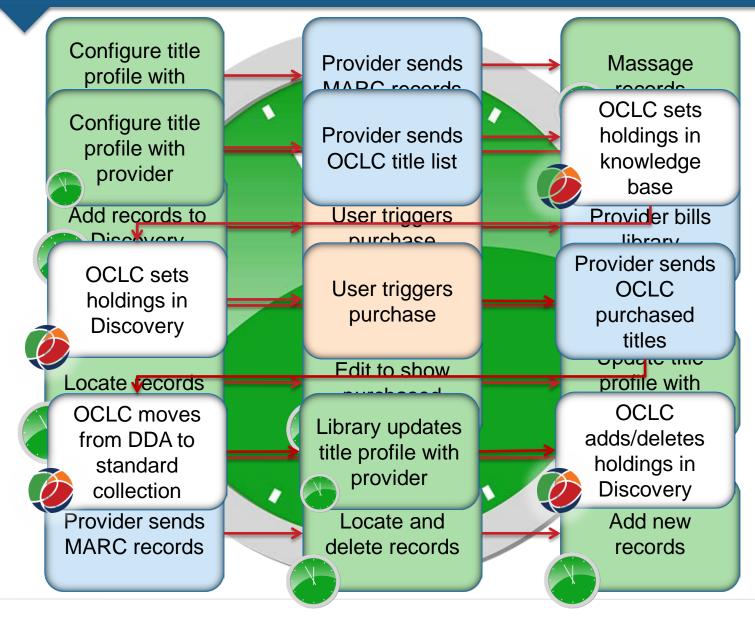
Questions and Discussion 2 ? ----5 2 2 Ŋ, 9 2

- Over 10,300 content collections from more than 5,400 providers
- Over 50 publishers and aggregators representing 13M eBooks including:

Books24x7	Ingram MyiLibrary
Credo Reference	Knovel Library
DawsonEra	Ovid
Ebook Library (EBL)	Safari Books Online
EBSCO	Springer
Ebrary	Informa Taylor & Francis
Emerald	Wiley

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Current DDA workflow



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Search for vendor collection - EBL

🧭 🖗 WorldShare							U	Need Help? V Troy Mohrman V ser support info
Metadata Acquisitions	Licenses Circ	ulation Interlibrary Lo	an Analytics	Admin				
Discover Items	Collection w	ith "ebl"						
- Discover Collections	Filter							
My Library Holdings Only	Results 1-2 of	2 Show 10 - rows pe	r page.					<< First < Previous 1 Next > Last >>
Collection -			Collection		Shared by		In My Holdings	Action
ebl 🕕	Ebook Lib	rary (Demand Driven Acquis	sitions)			0	Not Held by my library	
Search	Provider: Ebo Customizable	ok Library : Demand Driven Acquisitio	ns				(0/387765) Titles Select Collection	Add To Order
 Collection with "ebl", My Library Holdings Only 	and the second second	rary Catalogue				0	Not Held by my library (0 / 387765) Titles	Add To Order
 Collection with "ebf" 	Customizable						Select Collection	Name and Address of Concession, Name and
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Track Items								
► Receive & Invoice		•Two d	duplic	ate d	collect	tion	S	
Processed Items							-	
Manage Invoices								
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DDA/PDA workflows

Vendor sends 50 titles

🧼 🖗 WorldShare					eed Help? V Troy Mohrman
letadata Acquisitions	Licenses Circulation Interlibrary Loan Analytics Ad	Imin			
Discover Items	Collection with "ebl"				
Discover Collections	▶ Filter				
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ebl () Search	Ebook Library (Demand Driven Acquisitions) Provider: Ebook Library Customizable : Demand Driven Acquisitions		0/	Held by my library (50 / 387765) Titles Deselect Collection	Add To Order
Collection with "ebl", My Library Holdings Only Collection with	Ebook Library Catalogue Provider: Ebook Library Customizable		0	Not Held by my library (0/387765) Titles Select Collection	Add To Order
Manage Orders	Results 1-2 of 2 Show 10				<< First < Previous 1 Next > Las
Receive & Invoice					
Processed Items					
Processed Items Manage Invoices					
 Receive & Invoice Processed Items Manage Invoices Manage Budgets Manage Vendors 					

•WMS automatically adds these titles to the DDA collection

Vendor sends 50 new titles the next cycle

